

## **TERMS OF REFERENCE**

### **International Conference Organizer for Blue Carbon and Wetlands Conference**

#### **Regional**

#### **RG-T3409**

### **Regional Blue Carbon Monitoring, Reporting, and Verification Mechanism**

## **1. BACKGROUND**

The St. Augustine Center for Innovation and Entrepreneurship (STACIE), University of the West Indies, and the Inter-American Development Bank (IDB) have entered into a technical assistance program for the implementation of a monitoring verification and reporting (MRV) system for mangrove ecosystems in the region. The MRV program will provide a science-based data platform on the sequestration and release of blue carbon in mangrove systems for participant countries of the United Kingdom's Blue Carbon Fund administered by the IDB. The Fund was established to help reduce the negative impacts of climate change on blue carbon ecosystems. The regional MRV is to be used to help monitor the progress of the projects that are to be implemented under the Fund.

The MRV operation is being executed by STACIE, research innovation and entrepreneurship ecosystem of the University of the West Indies, St. Augustine, Trinidad and Tobago. With this MRV system, the blue carbon projects of the Fund will be able to: (i) Improve the valuation of ecosystem services provided by mangrove ecosystems; (ii) Potentially include blue carbon data in the Nationally Determined Contributions (NDC), Reduced Emissions from Deforestation and Forest Degradation (REDD+) schemes, Sustainable Development Goals (SDG) programs, UNFCCC National Communications, and carbon markets programs; (iii) Utilize an MRV system for results-based payments under a reforestation program.

### **1.1. Justification for the Study**

The Regional MRV program will develop and implement a standardized MRV for the blue carbon captured in mangrove ecosystems for those LAC countries that are beneficiaries of the Fund, which will help the Bank report on its progress. Data collected from all projects in the blue carbon program will be used for reporting on the Fund. Estimates from these projects can be compared to estimates prepared using the system developed in this project to review accuracy. This will be useful to countries as Article 5 1. of the Paris Agreement states, "Parties should take action to conserve and enhance, as appropriate, sinks and reservoirs of greenhouse gases as referred to in Article 4, paragraph 1 (d), of the Convention, including forests. The development of the regional MRV will indirectly contribute to building climate change resilience in the region by helping to increase the capacity to monitor the release and sequestration of blue carbon at project sites. The United Kingdom's Blue Carbon Fund administered by the IDB is currently supporting projects in Jamaica, Suriname, Panama and Columbia.

## **2. OBJECTIVES**

### **2.1. General Objective**

The objective of this consultancy is to organize and execute a well-organised international conference advancing the blue economy in commemoration of Wetlands Day in February.

### **2.2. Specific Objectives**

The specific objectives of this consultancy are:

- To draft, disseminate and manage the correspondence between STACIE, the IDB, project teams, sponsors, beneficiaries and stakeholders invited to the conference.
- To create documents for the conference.
- To manage the design and maintenance of media platforms for promotion of the conference.
- To manage registration and logistics for the planning, execution and closure of the conference.

- To report on the outputs of the conference.

### **3. SCOPE OF SERVICES/TASKS**

3.1. The consultant must be able to gather a strategic audience of persons from academia, community/NGO-based, industry and government who are drivers of conservation and research on the mangrove ecosystems. This will be a major conduit to promotion of the regional MRV methodology for acceptance by key stakeholders. This is envisaged to be a premier conference to share knowledge and ensure the key findings and information/knowledge are captured on mangrove conservation and MRV in Latin America and the Caribbean. The main activities of this consultancy include:

- Coordinate all aspects of planning and organizing the conference to ensure the objectives are achieved
- Develop a comprehensive conference plan inclusive of timeline, budgets, resource requirements
- Secure sponsorship from the private sector
- Develop project management matrices including but not limited to communication plan, stakeholder plan, RASCI matrix in collaboration with the Communications Specialist
- Meet with STACIE and IDB teams at least monthly or as required to discuss progress. This includes preparation of meeting agendas before and meeting minutes after the meeting.
- Report to the STACIE team for procurement and prepare documents for procurement by the Bursary and IDB's non-objection
- Identify and secure a suitable venue for the conference with close proximity to mangrove region, safe and has a vantage point to transport, accommodation and commercial places
- Invite leading experts in blue carbon research, climate financiers and private sector from around the world
- Invite keynote speakers from around the world
- Develop and manage a conference website
- Promote conference on social media and other channels getting a target of at least 100 participants
- Develop standardized requirements for abstract submissions
- Manage receipt of conference fees
- Coordinate with vendors and service providers for catering, equipment, room rental, translation, conference signage
- Organize travel, accommodation and per diems for persons funded by the project
- Oversee the submission and review process for abstracts and presentations
- Develop conference agenda and compile and format conference abstracts
- Develop mailing list for conference participants
- Create and manage content for advertisements
- Manage logistics at the conference including registration, greeting of stakeholders, taking attendance and ensuring activities are on schedule
- Draft conference proceedings for review
- Organize media promotion post conference in collaboration with the Comms Specialist
- Track accurately invoices and expenditure in a format to be reviewed by the STACIE team for transparency and accountability
- Follow-up with climate financiers
- Writing a final report accounting for how the consultant's time was spent and costed and recommendations

## Deliverables

3.2. The consultant is expected to produce the following deliverables:

- (i) Deliverable 1: Work plan with a timeline for deliverables (week 2). A communication plan, stakeholder plan and RASCI matrix will also be required.
- (ii) Deliverable 2: Progress Report for Months 1-3 (month 3). This will detail the key challenges and status with conference organizing and recommendations to keep activities on track. At this stage, the indicators should be a participant list of at least 50 confirmed persons, abstracts from at least 20 persons, website for conference functional with data analytics available to track, draft agenda, at least 2 sponsors and quotations for all budget line items for the conference.
- (iii) Deliverable 3: Final Report on the conference (month 6). This will capture the achievements from the conference and key learnings. The report should comprise an introduction, summary of progress, how the activities helped to achieve the component objectives, challenges, recommendations, tracking on any funds spent and conference proceedings.

## 4. CONSULTANT'S REPORTING OBLIGATION

Deliverables/ Reports		Content of Reports	Timeline	Payment Schedule
1	Work Plan	<ul style="list-style-type: none"> <li>• work plan with information on the scope of services/tasks with deadlines</li> <li>• communication plan</li> <li>• stakeholder engagement plan</li> <li>• RASCI matrix in consultation with STACIE and the IDB</li> </ul>	Two weeks after signing of contract	15%
2	Progress Report #1	Includes but not limited to: <ul style="list-style-type: none"> <li>• completion of specific deliverables from the communication plan</li> <li>• overall progress of the services/tasks performed with duration and outputs</li> <li>• important meetings attended with brief statements of their conclusions</li> <li>• reasons for any delay and comments on their impact and recommendations for resolutions</li> <li>• anticipated problems and recommended solutions</li> <li>• work program for the upcoming period</li> </ul>	12 weeks after signing of contract	35%
3	Draft Final Report	Includes but not limited to: <ul style="list-style-type: none"> <li>• executive summary</li> <li>• targeted commitments achieved</li> <li>• challenges</li> <li>• explanation for any variations to the work plan</li> <li>• lessons learnt</li> <li>• conference proceedings</li> <li>• recommendations and conclusions</li> </ul>	2 weeks before expiration of contract	20%
4	Final Report	Incorporates comments and recommendations of the coordinator and/or technical steering committee	2 days after acceptance of draft final report	30%

- (a) Reports in Microsoft Word format size 12 Times New Roman, single spaced, every two months, and with the following subheadings: (i) Introduction, (ii) Objectives, (iii) Progress on Activities and Budget, (iv) Methodology, (v) Results (vi) Discussion of Findings, (vii) Recommendations and Lessons Learnt (viii) Conclusion (ix) Appendices;
- (b) Two (2) copies, of a ZIP file of the electronic submission (or on CD ROM) shall be submitted to the STACIE for review. Final reports shall be delivered in CD ROM in addition to two (2) of hard copies;
- (c) Submission will be done on the last working day of the month in which the deliverable is due as per the workplan;
- (d) Submissions must be delivered in a written form to the address below by e-mail  
St. Augustine Centre for Innovation and Entrepreneurship (STACIE)  
Attn:  
Dr. Graham King  
St. Augustine Centre for Innovation and Entrepreneurship  
St. Augustine Campus  
The University of the West Indies  
St. Augustine  
Trinidad, W.I.  
Tel: +1 (868) 662-2002 ext. 82483  
Fax: +1 (868) 663-9684  
E-mail: [graham.king@sta.uwi.edu](mailto:graham.king@sta.uwi.edu)  
With copy to: [STA-MRVProject@sta.uwi.edu](mailto:STA-MRVProject@sta.uwi.edu); [damian.ali@sta.uwi.edu](mailto:damian.ali@sta.uwi.edu)  
[farrah.mathura@sta.uwi.edu](mailto:farrah.mathura@sta.uwi.edu)

## 5. QUALIFICATIONS AND EXPERIENCE

### 5.1. Minimum Academic Qualification: Minimum Academic Qualification:

- The consultant should have a Bachelor Degree in Communications, Marketing, Public Relations, communications, or related field areas.
- Fluency in oral and written Spanish.

### 5.2. Experience:

- At least five (5) years of experience in organizing international conferences
- At least five (5) years of experience working in the field of environmental studies and/or climate change
- At least three (3) years of experience using digital communication tools and platforms
- Specific Experience:
  - Experience in engaging stakeholders across academia, governments, private sector, community/NGO and/or multilaterals, finance sector and governments in Latin America and the Caribbean
  - Experience in branding, documentation, website maintenance, media releases for organizing environmentally based conferences
  - Demonstration of a good understanding of the Blue Economy in Latin America and the Caribbean
  - General knowledge of ocean resources management, economic innovation and recovery

### 5.3. Key Skills: The consultant should demonstrate the following skills:

- Strong interpersonal, verbal and written communication skills
- Proven ability to advise and train users in complex systems/applications and effectively prepare specifications and other documentation in a clear and concise style. Ability to communicate with various levels of technical experience
- Digital marketing and graphic design
- Proven track record of previous work with stakeholders such as governments and/or multilaterals

Only individuals who meet the minimum qualifying requirements shall be considered.

**6. COMPULSORY COMPLIANCE:**

- Eligibility: as per *Policies for the Selection and Contracting of Consultants Financed by IDB* 1.13 of GN-2350-15) as per information on Eligible Countries at Annex 3.
- No Conflict of Interest: as per 1.11 of GN-2350-15.
- Not Sanctioned by the Bank: IDB's Group List of sanctioned firms and individuals – <https://www.iadb.org/en/topics/transparency/integrity-at-the-idb-group/sanctioned-firms-and-individuals%2C1293.html>

**7. CHARACTERISTICS OF THE CONSULTANCY**

- i) Type of Consultant: Individual
- ii) Expected Start Date: September 1<sup>st</sup> 2024  
Contract duration: 6 months
- iii) Place (s) of Work: Home-Based with paid travel for conference
- iv) Working Language: English

**8. EMPLOYER'S INPUT AND COUNTERPART PERSONNEL**

- a) Services, facilities and property to be made available - access to information including data from previous activities, conference room for meetings with stakeholders, logistical support for workshops, meetings, seminars and access to websites and social media platforms.
- b) The consultant can seek guidance from the project manager and communication specialist. A secretary will not be assigned.

## **Annexes**

Selection Criteria/sub criteria

Curriculum Vitae format

List of Bank's Eligible Countries

## **Annex 1: Selection Criteria**

	<b>SELECTION CRITERIA</b>	<b>MAXIMUM POINTS</b>
<b>1</b>	<b>Academic Qualification (Highest level attained)</b>	<b>10</b>
	a. Bachelor Degree in Degree in Communications, Marketing, Public Relations, communications, or related field areas or other related discipline	7
	b. Fluency in oral and written Spanish	3
<b>2</b>	<b>General Experience (Each criterion)</b>	<b>30</b>
	a. At least five (5) years of experience in organizing international conferences	10
	b. At least five (5) years of experience working in the field of environmental studies and/or climate change	10
	c. At least three (3) years of experience using digital communication tools and platforms	10
<b>3</b>	<b>Specific Experience (Each criterion)</b>	<b>30</b>
	<b>a. Experience in engaging stakeholders across academia, governments, private sector, community/NGO and/or multilaterals, finance sector and governments in Latin America and the Caribbean</b>	<b>10</b>
	a. 2 similar assignments or more	10
	b. Less than 2 similar assignments	5
	c. No similar assignments	0
	<b>b. Experience in branding, documentation, website maintenance, media releases for organizing environmentally based conferences</b>	<b>10</b>
	a. 5 years or more	10
	b. More than 3 years and less than 5 years	8
	c. Less than 3 years	5
	<b>c. Demonstration of a good understanding of the Blue Economy in Latin America and the Caribbean</b>	<b>5</b>
	<b>d. General knowledge of ocean resources management, economic innovation and recovery</b>	<b>5</b>
<b>4</b>	<b>Adequacy for the Assignment (Each criterion)</b>	<b>30</b>
	a. Strong interpersonal, verbal and written communication skills	5
	b. Proven ability to advise and train users in complex systems/applications and effectively prepare specifications and other documentation in a clear and concise style. Ability to communicate with various levels of technical experience	5
	c. Digital marketing and graphic design	10
	d. Proven track record of previous work with stakeholders such as governments and/or multilaterals	10
	<b>Total Points Attainable</b>	<b>100</b>

## **Annex 2: Curriculum Vitae format**

Name of Consulting Service:	
Name of Individual Consultant:	<i>[Insert full name]</i>
Date of Birth:	<i>[ day/month/year]</i>
<sup>1</sup> Nationality	

**Education:** *[List college/university or other specialized education, giving names of educational institutions, dates attended, degree(s)/diploma(s) obtained]*

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**Experience Relevant to the Assignment:** *[Experience related to the services and tasks to be performed; professional skills according to the assignment requirements, and knowledge of administrative systems and government organization within the country of the Employer, Region or similar. List previous positions relevant to the Assignment in reverse order, provide dates, name of contracting organization, titles of positions held, types of activities performed that best illustrate capability to handle the services/tasks and location of the assignment. Provide contact information of previous Employers who can be contacted for references. past position that is not relevant to the assignment does not need to be included.]*

<b>Period</b>	<b>Contracting Organization/type of services provided/ Title/Position; Contact Information for References</b>	<b>Country</b>	<b>Summary of Key Activities Performed relevant to the Assignment</b>
<i>[e.g., May 2015-present]</i>	<i>[e.g., Ministry of ....., advisor/consultant to...  For references: Tel...../e-mail.....; Mr. Bbbbbb, Deputy Minister]</i>		

**Membership in Professional Associations and Publications:**

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<sup>1</sup> See Annex 3 of the Terms of Reference Outline for list of member countries of the Bank





### **Annex 3: Eligible Countries**

This section lists the Bank’s member countries, as well as the criteria to determine the nationality of consultants.

“Eligible countries are: Argentina, Austria, Bahamas, Barbados, Belgium, Belize, Bolivia, Brazil, Canada, Colombia, Costa Rica, Chile, Croatia, Denmark, Dominican Republic, Ecuador, El Salvador, Finland, France, Germany, Guatemala, Guyana, Haiti, Honduras, Israel, Italy, Jamaica, Japan, Mexico, Netherlands, Nicaragua, Norway, Panama, Paraguay, People’s Republic of China, Peru, Portugal, Republic of Korea, Slovenia, Spain, Suriname, Sweden, Switzerland, Trinidad & Tobago, United Kingdom, and United States, Uruguay and Venezuela.

Eligible Territories are:

- a) Guadeloupe, French Guiana, Martinique, Reunion – as Departments of France
- b) U.S. Virgin Islands, Puerto Rico, Guam – as Territories of the USA
- c) Aruba – as a constituent country of the Kingdom of the Netherlands; and Bonaire, Curacao, Saint Marten, Saba, St Eustatius – as Departments of the Kingdom of the Netherlands
- d) Hong Kong – as a Special Administrative Region of the People’s Republic of China”.

#### **Nationality and origin of Goods and Services Criteria**

The policy provisions make it necessary to establish criteria to determine a) the nationality of the firms and individuals eligible to bid or participate in a bank-financed contract and b) the country of origin of goods and services. For these determinations, the following criteria shall be used:

##### **Nationality:**

**An individual** is considered to be a national of a member country of the Bank if he or she meets either of the following requirements:

- i. is a citizen of a member country; or
- ii has established his/her domicile in a member country as a “bona fide” resident and is legally entitled to work in the country of domicile.